Service Cloud Case Actions Configuration

Streamline tasks to save your agents valuable time.

Help your service agents streamline tasks and work more efficiently. Certified Specialists will help you determine which service processes you can automate with Quick Actions. Then you'll learn how to build those actions in your sandbox for fast testing and implementation.

What it can do for you

· Increase service rep efficiency

· Reduce time to close cases

· Reduce service response time

How it works

Certified Specialists will guide you through the process over a predetermined timeframe (typically 1-2 weeks):

Discovery

· Discuss current challenges and business goals

· Review quick actions options and features

· Identify five processes/use cases that could be streamlined using Quick Actions

· Agree on quantifiable success goals

Analysis

· Configure the Quick Actions in a sandbox environment

· Share best practices for setup and usage

Outcomes

· Report findings and recommendations for future development

ACCELERATOR COST	5 POINTS

GOAL

Reduce costs.

INTENDED USER

Service teams looking to drive agent productivity to help resolve customer issues faster.

PREREQUISITES

· Must have Service Cloud licenses purchased and assigned

· Currently using Case Feed but are only using default global actions in the publisher

· Require admin access to a sandbox instance

· No code or data migration

· Executive sponsor committed to outcome

Learn how we can help you accelerate your CRM success.

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